STATE COURT ADMINISTRATIVE OFFICE

CASELOAD REPORTING SYSTEM
USER GUIDE AND SPECIFICATION

MARCH 7, 2006

CONTENTS

1 Introduction

This guide is intended to document for end users the screen functionality of the Caseload Reporting System (CRS). This document describes the intent and navigation mechanisms of each screen, as well as what each data field represents and how it is to be used.

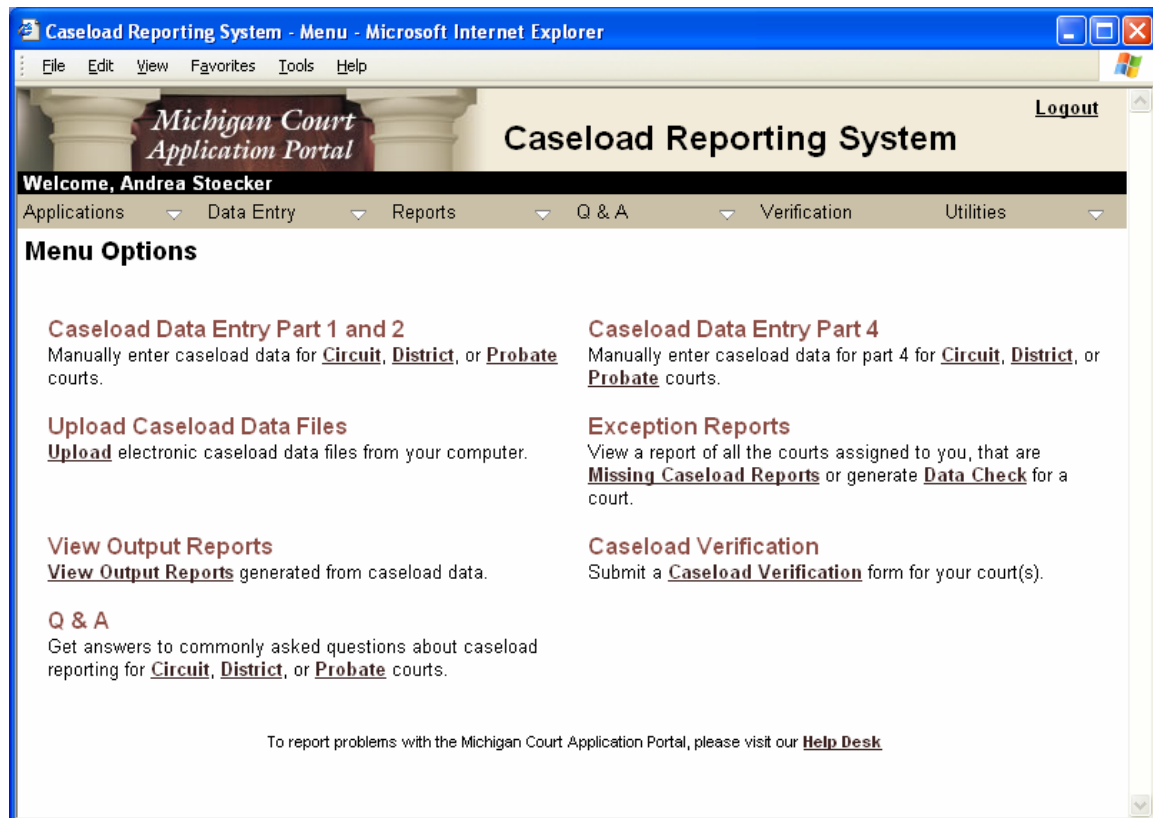# 2 Software Application Screens

2.1 Menu Options Screen

Figure 1: Menu Options Screen

2.1.1 Purpose

This screen displays links to all areas of CRS that are available to the user, as well as descriptions of each area. The Caseload Verification link is only available from January 1 until March 1 of each year.

2.1.2 Usage

This screen allows the user to navigate to all authorized areas of the web site from a single screen. When a user exits other screens, they are returned to the menu screen.

2.2   Parts 1 and 2 Data Entry Screens

Figure 2: Parts 1 and 2 Court, Quarter, and Year Selection Screen

Figure 3: Parts 1 and 2 Data Entry Screen

2.2.1   Purpose

The selection screen allows the user to select a court, quarter, and year for which to edit or view caseload data. The data entry screens allow the user to view or edit caseload data for all sections under parts 1 and 2.

2.2.2   Usage

The focus begins in the Court Name field where the user can select from the courts they are associated with. The user may then enter the quarter and year for the caseload data they wish to view or edit. When the user clicks the Continue button, the database is searched for any existing data, which populates the fields on the ensuing screen. After entering the data in a table, the user must save the data before selecting any of the other tabs. The user may also cancel without saving or view reporting instructions. Any control may be accessed by tabbing to or clicking on it.

2.2.3   Screen Element Descriptions and Usage

Name	Description	Usage
Preparer's Name	The full name associated with the user logged in to the system.	No additional functionality.
Telephone	The telephone number associated with the user logged in to the system.	No additional functionality.
Court Name	Lists the court(s) the user is assigned to.	This field cannot be left blank.
Quarter	Lists the four quarters of a year.	The previous quarter is selected; however the user may select a different quarter. This field cannot be left blank.
Year	Accepts the year.	The year associated with the previous quarter is displayed; however the user is able to enter a different year. The year entered must contain four digits and cannot be left blank.
Caseload Value Fields	Accepts the number of cases that are applicable to the associated Action (row heading) and Case Type (column heading).	These data fields may contain a maximum of six digits and may be left blank.
Part 1 Tab	When clicked, this displays the caseload data entry table for Part 1, Section A.	No additional functionality.
Part 2 Tab	When clicked, this displays the caseload data entry table for Part 2, Section A.	No additional functionality.
Section Tabs	When clicked, these display the caseload data entry table for the selected Part and Section.	No additional functionality.
Save Button	Saves the data entered in the database.	Triggers the data validation routines.
Cancel Button	Returns the user to the Menu screen and does not save the data entered in the database.	No additional functionality.
Reporting Instructions	Opens a new window with reporting instructions for the current part and court type.	No additional functionality.

2.3   Part 4 Data Entry Screens

Figure 4: Part 4 Court and Year Selection Screen

Figure 5: Part 4 Data Entry Screen

2.3.1 Purpose

The selection screen allows the user to select a court and year for which to edit or view caseload data. The data entry screens allow the user to select or enter a judge p number to view or edit caseload data for all sections under part 4.

2.3.2 Usage

The focus begins in the Court Name field where the user can select from the courts they are associated with. The user may then enter the year for the caseload data they wish to view or edit. On the data entry screen the user may enter a judge p number, or select from

a list of judges with existing data. When the user clicks the Submit Judge button, the database is searched for any existing data, which populates the data entry fields. After entering the data in a table, the user must save the data before selecting any of the other tabs. The user may also cancel without saving or view reporting instructions. Any control may be accessed by tabbing to or clicking on it.

2.3.3   Screen Element Descriptions and Usage

Name	Description	Usage
Preparer's Name	The full name associated with the user logged in to the system.	No additional functionality.
Telephone	The telephone number associated with the user logged in to the system.	No additional functionality.
Court Name	Lists the court(s) the user is assigned to.	This field cannot be left blank.
Year	Accepts the year.	The year associated with the previous quarter is displayed; however the user is able to enter a different year. The year entered must contain four digits and cannot be left blank.
New Judge P No	Accepts a valid judge or attorney magistrate bar number, or P99999 for non-attorney magistrates in district courts.	The user may enter the bar number with or without the p. This field cannot be left blank.
View/Edit Judge P No	Lists the judges and attorney magistrates that have existing data for the court and year selected.	No additional functionality.
Submit Judge	Selects the judge or attorney magistrate to edit or view.	Displays any existing data for the judge or attorney magistrate selected.
Caseload Value Fields	Accepts the number of cases that are applicable to the associated Action (row heading) and Case Type (column heading).	These data fields may contain a maximum of six digits and may be left blank.
Section Tabs	When clicked, these display the caseload data entry table for the selected Part and Section.	No additional functionality.
Save Button	Saves the data entered in the database.	Triggers the data validation routines.
Cancel Button	Returns the user to the Menu screen and does not save the data entered in the database.	No additional functionality.
Reporting Instructions	Opens a new window with reporting instructions for the current part and court type.	No additional functionality.

2.4 Upload Caseload Data Screen

Figure 6: Upload Caseload Data Screen

2.4.1 Purpose

This screen allows the user to select an electronic caseload data file from their computer and upload it to the caseload database.

2.4.2 Usage

The focus begins in the File Name field where the user may enter the file path or use the Browse button to select the file from their computer. The user may then tab to or click on the other controls, or hit the Enter key to begin the upload process. The Cancel button returns the user to the Menu screen. Any control can be accessed by tabbing to or clicking on it.

2.4.3 Screen Element Descriptions and Usage

Name	Description	Usage
Contact Name	The full name associated with the user logged in to the system.	No additional functionality.
Phone Number	The phone number associated with the user logged in to the system.	No additional functionality.
File Name	The name and path of the file to be uploaded.	The path and file name can be typed into the field or selected via the Browse button. The path entered must be for a properly formatted .txt file and cannot be left blank.

Name	Description	Usage
Append	Indicates that the user wishes to append the uploaded caseload data rather than overwrite the existing data.	If checked, the uploaded data will be added to any existing data.
Browse Button	Allows the user to explore their computer for the file they wish to upload and select it.	When the file is selected, the path and file name appear in the File Name field.
Upload Button	Begins the upload process.	No additional functionality.
Cancel Button	Cancels the upload process and returns the user to the Menu screen.	No additional functionality.

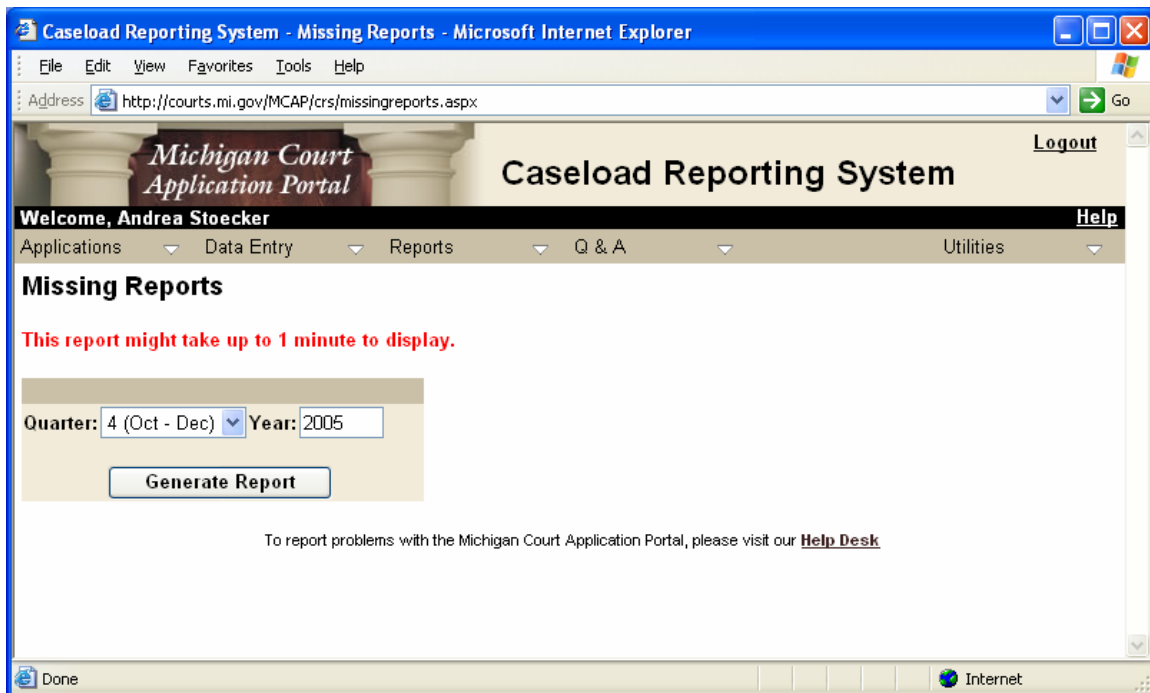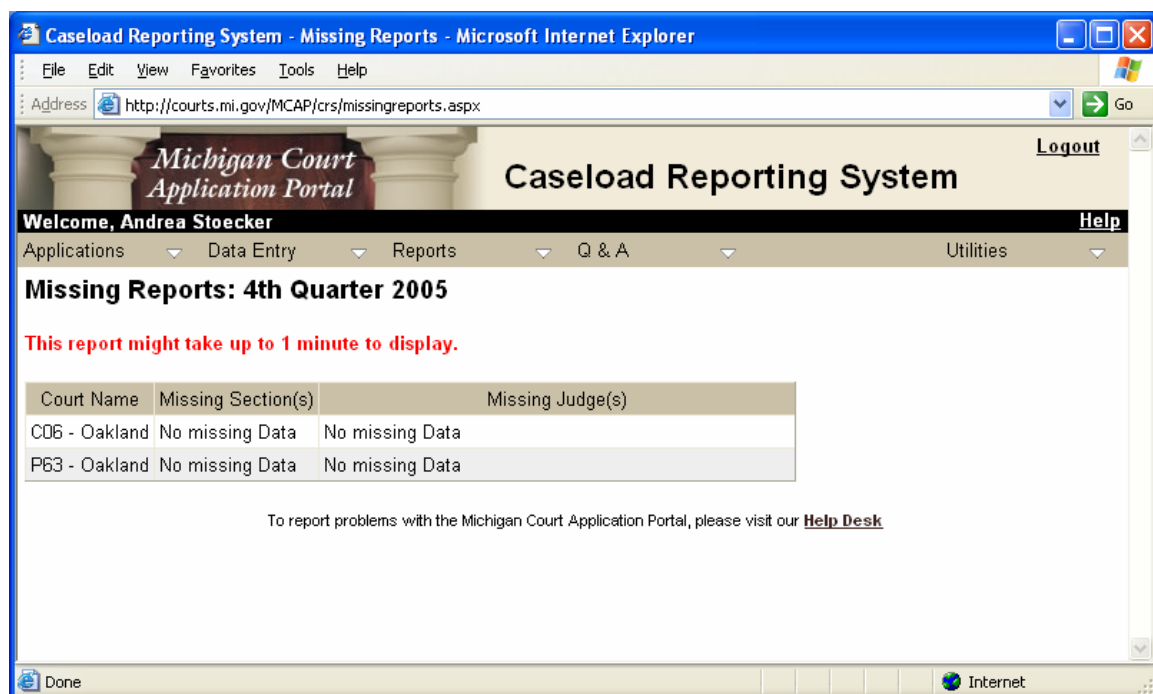## 2.5 Missing Reports Screens

Figure 7: Missing Reports Quarter and Year Selection Screen

Figure 8: Missing Reports Screen

2.5.1   Purpose

The selection screen allows the user to enter the quarter and year for which they wish to view missing caseload data. The results screen displays the associated courts, along with the missing sections and judges. Missing judges are only displayed if either the "All" or "4 (Oct – Dec)" option is selected.

2.5.2   Usage

The focus begins in the Quarter field where the user can select the quarter they wish to view. The user may then enter the year to check for missing reports. After clicking the Generate Report button a web page report will list each of the user's associated courts that are missing data, along with the missing sections and judges. Any control may be accessed by tabbing to or clicking on it.

2.5.3   Screen Element Descriptions and Usage

Name	Description	Usage
Quarter	Lists the four quarters of a year, and an "All" option.	The previous quarter is selected; however the user may select a different quarter. This field cannot be left blank.
Year	Accepts the year.	The year associated with the previous quarter is displayed; however the user is able to enter a different year. The year entered must contain four digits and cannot be left blank.
Generate Report Button	Passes the parameters to the report page, which then displays the results.	Triggers the data validation routines.

Name	Description	Usage
Court Name	Lists the court(s) associated with the user that are missing caseload data for the selected quarter and year.	No additional functionality.
Missing Section(s)	Lists the sections in parts 1 and 2 that are missing data.	No additional functionality.
Missing Judge(s)	Lists the judges and sections in part 4 that are missing data.	Only elected judges (and attorney magistrates for district courts) are required, however any other judge that is entered must be completed in full.

2.6　Data Check Report Screen

Figure 9: Data Check Report Screen

2.6.1　Purpose

This screen allows a user to select from a list of associated courts (for circuit and district only) and view a comparison of disposition or ending pending calculations between parts 1, 2, and 4.

2.6.2　Usage

The focus begins in the court field where the user may select from a list of associated courts. The user may then enter a year for the caseload data for which they wish to view a data check report. After entering the parameters the user may generate the End Pending Report or Dispositions Report. Any control can be accessed by tabbing to or clicking on it.

2.6.3 Screen Element Descriptions and Usage

Name	Description	Usage
Court	Lists the court(s) the user is assigned to.	This field cannot be left blank.
Year	Accepts the year.	The year associated with the previous quarter is displayed; however the user is able to enter a different year. The year entered must contain four digits and cannot be left blank.
Generate…Report Button	Allows the user to select which type of report to generate.	Displays the selected report.

2.7 Caseload Verification Screens

Figure 10: Verification Court Selection Screen

Figure 11: Verification Form Screen

2.7.1 Purpose

The selection screen allows the user to select one or all of their assigned courts. The verification form allows the user to indicate to SCAO that the caseload data for parts 1 and 2 have been verified and are available for publication. Upon submission of the form, a verification e-mail is sent to the user, chief judge, and court administrator of each court selected.

2.7.2 Usage

The focus begins in the court field where the user may select from a list of associated courts. After the user selects a court, they may continue to the verification form. After clicking the checkbox indicating that they agree with the statement, they may then tab to or click on the Verify button. Any control can be accessed by tabbing to or clicking on it.

2.7.3 Screen Element Descriptions and Usage

Name	Description	Usage
Court	Lists the court(s) the user is assigned to.	This field cannot be left blank.
Continue	Continues to the verification form for the court(s) selected.	No additional functionality.
I have read…	When checked indicates that the user agrees with the statement.	Checking the box enables the Verify button.
Verify Button	Submits the verification form.	Sends an e-mail to the user, chief judge and court administrator of each court selected.

Name	Description	Usage
Cancel Button	Cancels the verification.	Returns the user to the Menu screen.

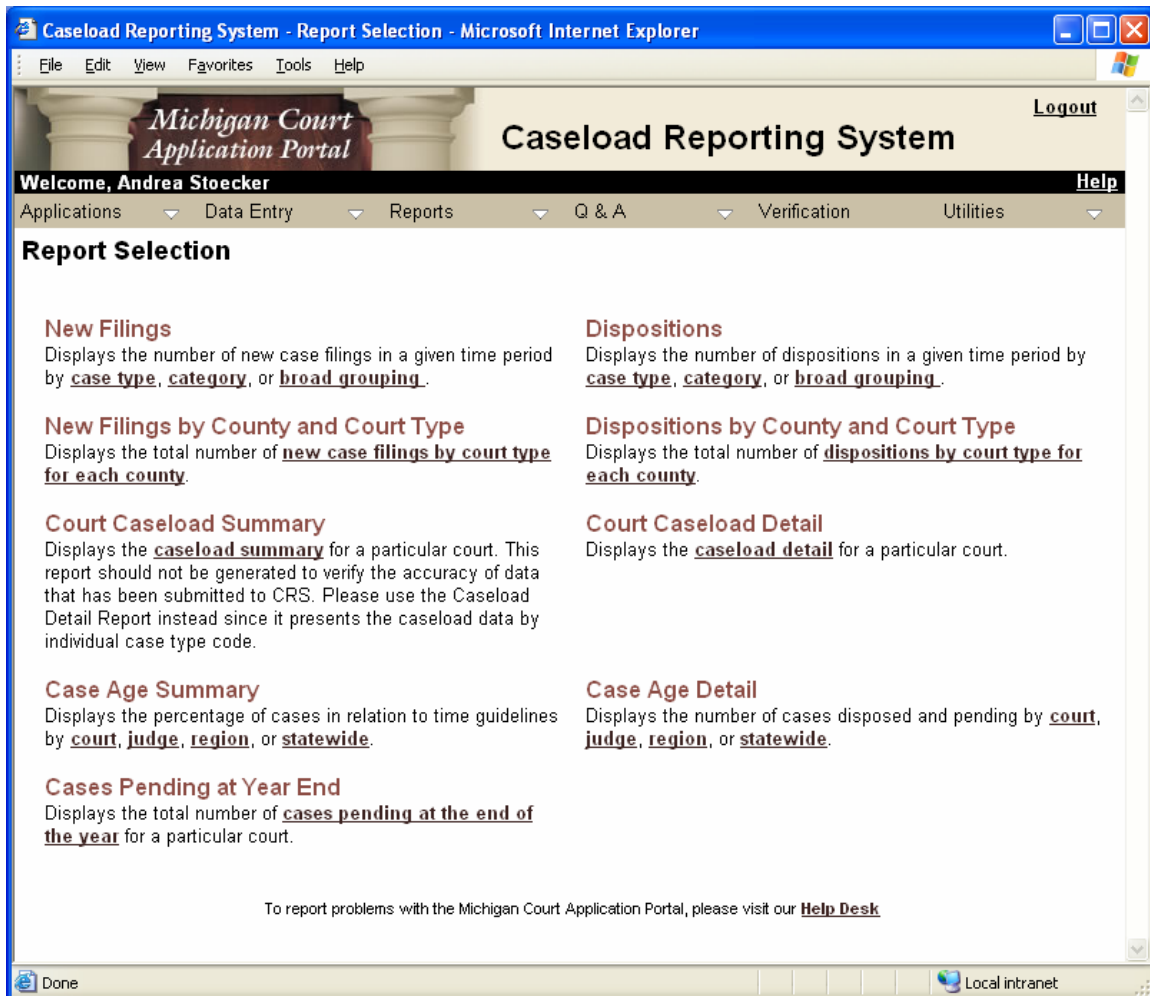## 2.8   Report Selection Screen

Figure 12: Report Selection Screen

2.8.1   Purpose

This screen allows the user to select one of the standard output reports that can be generated from the caseload data.

2.8.2   Usage

The user selects the report they wish to view and is redirected to the Report Parameter screen.

2.8.3 Screen Element Descriptions and Usage

Name	Description	Usage
Report Names	Lists all of the available reports and their descriptions.	Links the user to the Report Parameter screen.

2.9 Report Parameter Screen

Figure 13: Report Parameter Screen

2.9.1 Purpose

This screen allows the user to enter report parameters and generate the report.

2.9.2 Usage

The focus begins in the first parameter field, which for most reports is the Court Name field. After the user selects a court, they may enter additional parameters by tabbing to or clicking on the other fields. After selecting the parameters the user may generate the report. Any control can be accessed by tabbing to or clicking on it.

2.9.3　　　Screen Element Descriptions and Usage

Name	Description	Usage
Report Name	The name of the report the user selected from the previous screen.	No additional functionality.
Court Name	The list of courts the user may select from.	This field cannot be left blank.
Case Type(s)	The list of case types the user may include in the report.	The user must select a minimum of one and a maximum of 12.
Date Range	The date range the user wishes to view data for.	The start date must fall between the first quarter of 2002 and the current quarter. The end date must be the same as, or later than, the start date, and before the current quarter. The year fields must contain valid four digit years. These fields cannot be left blank.
Report Format	The report format the user wishes to view data in.	This field cannot be left blank.
Judge P No	The judge for which the user wishes to view data.	May be entered with or without the p, otherwise it must be a five digit number. This field cannot be left blank.
Region	Lists the regions in the state.	This field cannot be left blank.
Court Type	List the available court types.	This field cannot be left blank.
Generate Report Button	Passes the parameters to the Crystal Report engine, which then displays the report.	Triggers the data validation routines.